



# Documenting Certifications and Follow-Up Visits in M-SPIRIT

# Child Certification Example

- 4- year old child
- Currently doesn't have a health care provider
- Eats a variety of foods, except few vegetables
- Is growing well; hemoglobin is normal

# Nutrition Education (N.E.)Topics

- Five Topics Must be Discussed for every Certification:
  - Rights and Responsibilities
  - Purpose of WIC Program
  - Nutrition Risk Codes
  - Benefits of WIC Foods
  - Substance Abuse Information for all women participants and for the parents/guardians of infant and child participants

# Required N.E. Topics

**Add Individual Nutrition Education Contact**

Contact Date: 03/26/2010

Type: Primary Contact (at Cert., Re-

Topic Discussed:

- Rights and Responsibilities
- Purpose of WIC Program
- Nutrition Risk Codes
- Benefits of WIC Foods
- Alcohol, Tob., Drug Use (Caregivers)
- Receiving Ongoing Health Care
- Achieving a Normal Growth Pattern
- Remaining Healthy and Safe
- Consuming a Variety of Foods
- Achieving Self-Feeding Milestones

OK Cancel

# Individual N.E. Topics

- Broad Health Outcome Goals for each Participant Category
- Select the broad topics discussed with the participant
- Breastfeeding education and support must be provided for all pregnant and breastfeeding participants

# For Our Example

- Which Individual Topics to Select?
  - Receiving Ongoing Health Care
  - Achieving a Normal Growth Pattern
  - Consuming a Variety of Foods

# Complete N.E. Contact

**Add Individual Nutrition Education Contact**

Contact Date: 03/26/2010

Type: Primary Contact (at Cert., Re-

Topic Discussed

- Rights and Responsibilities
- Purpose of WIC Program
- Nutrition Risk Codes
- Benefits of WIC Foods
- Alcohol, Tobacco, Drug Use (Caregivers)
- Receiving Ongoing Health Care
- Achieving a Normal Growth Pattern
- Remaining Healthy and Safe
- Consuming a Variety of Foods
- Achieving Self-Feeding Milestones

OK Cancel

# Goal Setting Contacts

- Not required, but recommended, to document participant's goal here
- Goal categories are the same broad Health Outcomes for each category
- Select the category of the main participant goal
- Can not document the result at this time for a goal which is just being set



# Goal Setting Contact Example

The screenshot displays the 'Nutrition Education Contact' application window. The main window has a title bar with standard Windows controls. Below the title bar, the path 'Nutrition Education Contacts/Peer Counselor Referrals/Materials Given for Household Member' is shown. The left pane contains a tree view with the following structure:

- Education Contacts
  - Individual - 3/26/2010 - Primary Contact (at Cert., Re-cert.)
    - Rights and Responsibilities
    - Purpose of WIC Program
    - Nutrition Risk Codes
    - Benefits of WIC Foods
    - Alchol, Tob, Drug Use (Caregivers)
    - Receiving Ongoing Health
    - Achieving a Normal Growth
    - Consuming a Variety of Foods
  - Peer Counselor Referrals
  - Materials Given

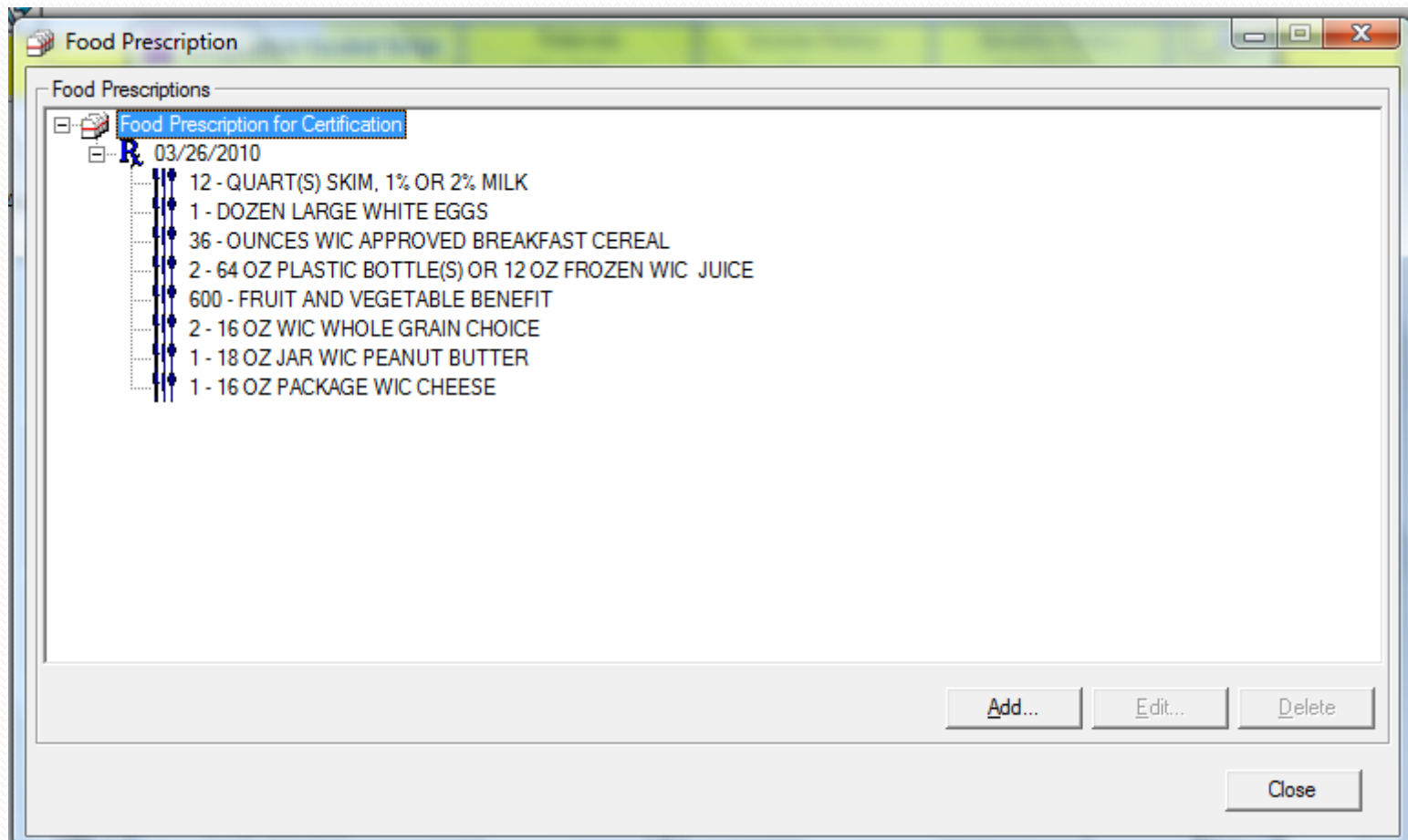
A modal dialog box titled 'Add Goal Setting Contact' is open in the center. It contains the following fields:

- Contact Date: 03/26/2010 (dropdown menu)
- Goal: Consuming a Variety of Foods (dropdown menu)
- Result: (empty dropdown menu)
- Buttons: OK, Cancel

The right pane of the main window contains several buttons:

- Add Materials Given
- Add Individual Contact
- Add Goal Setting Contact
- Add Group Education Contact
- Refer to Peer Counselor
- Edit Contact, Material or Referral
- Delete Contact, Material or Referral
- Close

# Food Package Selection



# Tailored Food Packages

- Remember, substituting 1# cheese for 1 gallon of milk creates a tailored food packages
- Tailored food packages provide less than the maximum allowed foods for a participant's category
- Tailoring of food packages must be documented in the participant's record
- This documentation should indicate whether the package was tailored based on the CPA's judgment or at the request of the participant/guardian

# SOAP Notes

- Nutrition care plan is documented in a Soap note format
- Much information is brought into the note during the certification process
- Heights, weights/lengths, hemoglobins
- Risk factors
- Topics discussed
- Goal setting contacts

# SOAP Note Example

The screenshot shows a software window titled "Create SOAP Note". At the top, there is a dropdown menu for "Subject of Note:" with "SOAP" selected. Below this is a large text area containing a sample SOAP note. The note is structured with sections: "S:" (Subject), "O:" (Objective), "Risk Factors Assigned on 3/26/2010", "Goal Setting Contacts", "Topics discussed on 3/26/2010", and "A:" (Assessment). The "O:" section includes growth data and lab results. The "Risk Factors" section lists "401 Failure to Meet Dietary Guidelines for Amer. (age 2-5 yr)". The "Goal Setting" section includes a goal about consuming a variety of foods. The "Topics discussed" section lists several items related to WIC and health care. At the bottom of the window, there is a label "Application Area Certification", a checkbox for "Protected" which is unchecked, and "OK" and "Cancel" buttons.

Create SOAP Note

Subject of Note: SOAP

Create SOAP Note

S:

O:  
3/26/2010 432/8 inches inches 42 pounds 12 ounces. Height for age percentile: 86.33% Weight for age percentile: 81.09%  
3/26/2010 HGB:0 HCT: 0 Lead:0 E.P.:0

Risk Factors Assigned on 3/26/2010

401 Failure to Meet Dietary Guidelines for Amer. (age 2-5 yr)

Goal Setting Contacts

Goal set on 3/26/2010: Consuming a Variety of Foods  
Goal Result:

Topics discussed on 3/26/2010

Rights and Responsibilities  
Purpose of WIC Program  
Nutrition Risk Codes  
Benefits of WIC Foods  
Alcohol, Tob, Drug Use (Caregivers)  
Receiving Ongoing Health Care  
Achieving a Normal Growth Pattern  
Consuming a Variety of Foods

A:

Application Area [Certification](#) ☐ Protected OK Cancel

# To Complete SOAP Note

- Add “S” – Subjective Comments
- Document any Risk Code Issues – missing or incorrectly assigned
- List the specific, measurable goal established between the CPA and the participant
- Add specific information on the topics discussed

# Completed Note (S,O)

**Create SOAP Note**

Subject of Note: SOAP

Create SOAP Note

S: Our Dr. has left town - Who's good? She eats everything well, except vegetables. The only one she'll eat is broccoli. states Mom

O:  
3/26/2010 432/8 inches inches 42 pounds 12 ounces. Height for age percentile: 86.33% Weight for age percentile: 81.09%  
3/26/2010 HGB:0 HCT: 0 Lead:0 E.P.:0

Risk Factors Assigned on 3/26/2010

401 Failure to Meet Dietary Guidelines for Amer. (age 2-5 yr)

Goal Setting Contacts

Goal set on 3/26/2010: Consuming a Variety of Foods - Will purchase and cook two new veg with child with F&V  
Benefit  
Goal Result:

Topics discussed on 3/26/2010

Rights and Responsibilities  
Purpose of WIC Program  
Nutrition Risk Codes  
Benefits of WIC Foods  
Alchol, Tob, Drug Use (Caregivers)  
Receiving Ongoing Health Care - list of local MD given  
Achieving a Normal Growth Pattern  
Consuming a Variety of Foods - Discussed ways to inc. veg. intake - shopping and cooking with child, gardening

Application Area [Certification](#) ☐ Protected

# To Complete SOAP Note (cont.)

- Complete “A” – Assessment
  - Evaluate growth or prenatal weight gain
  - Evaluate diet/feeding pattern
  - For pregnant, breastfeeding women – evaluate breastfeeding interest and experience
  - Document food package tailoring and any other pertinent information
- Create “P” – Plan
  - Plan for the participant’s future visits



# Completed Note (A,P)

The screenshot shows a software window titled "Create SOAP Note". At the top, there is a "Subject of Note:" label followed by a dropdown menu containing the text "SOAP". Below this is a large text area containing the following text:

Create SOAP Note  
3/26/2010 HGB:0 HCT: 0 Lead:0 E.P.:0  
Risk Factors Assigned on 3/26/2010  
401 Failure to Meet Dietary Guidelines for Amer. (age 2-5 yr)  
Goal Setting Contacts  
Goal set on 3/26/2010: Consuming a Variety of Foods - Will purchase and cook two new veg with child with F&V Benefit  
Goal Result:  
Topics discussed on 3/26/2010  
Rights and Responsibilities  
Purpose of WIC Program  
Nutrition Risk Codes  
Benefits of WIC Foods  
Alcohol, Tob, Drug Use (Caregivers)  
Receiving Ongoing Health Care - list of local MD given  
Achieving a Normal Growth Pattern  
Consuming a Variety of Foods - Discussed ways to inc. veg. intake - shopping and cooking with child, gardening  
  
A: Child growing well. Appears to be eating var. of foods, except veg. Drinks 2-3 cups 1% milk daily. 1# cheese in food pkg. per Mom's request.  
  
P: F/U goal, obtaining HCP

At the bottom of the window, there is a label "Application Area" followed by the text "Certification". To the right of this is a checkbox labeled "Protected" which is currently unchecked. Further right are two buttons: "OK" and "Cancel".

# Follow-Up Education Visits

- Can select Education topics and Goal Setting Contact as desired
- Can create either a SOAP or a General Note
- For General Notes, select appropriate topic screen before going into “Manage Notes”
- Follow the plan from the certification note or most recent follow-up note
- If weight, height/length, HGB rechecked, assess
- Include any new pertinent information
- Create a new Plan for the next visit



# Food Package III Review

# Food Package III

- Issued to medically fragile:
  - Infants
  - Children
  - Women
- Include:
  - Medical Formula
  - Prescribed foods the participant would be eligible to receive in the appropriate “regular” WIC food package
  - Whole milk for children age 2 years and older, and women for an appropriate medical condition requiring additional calories

# Medical Formulas

- Include specialty formulas such as Alimentum, Nutramigen, Pregestimil, Elecare, Neocate, Enfacare, NeoSure, Ensure
- Include standard infant formulas used for children age one and older – Similac Advance, Similac Sensitive, Similac Sensitive Isomil Soy, Similac Sensitive for Spit Up
- Although soy beverage and goat milk for children require a prescription, they are not medical formulas and do not fall under Food Package III

# Reminders

- Food Package III may only be issued to participants with appropriate medical conditions
- Supplemental foods may not be issued as part of Food Package III unless they are prescribed in writing
- Whole milk may be issued for children 2 years and older and for women **only** as part of Food Package III
- The quantity of medical formula to issue must be prescribed
- RD approval must be written in the notes or scanned in and must include the amount of formula and foods to issue and the length of time approved

# Check “Requires Food Package III” on participant’s Health Information screen and confirm the date

File Participant Activities Benefit Management Document Imaging Help

Demographics Immunization HT/WT/Blood Food Prescription Risk Factors VENA  
Health Information Nutrition Education Referrals Income History Benefits History Appointments

**Birth Information**

Birth Weight 8 Lbs 1 Ozs Birth Height 20 In 0 8ths ☐ Premature Birth Gestation Weeks 39  
Birth Facility

**Mother's Information**

Birth Date 4/4/1977 ☒ On WIC State WIC Information \*\*Two-Way Link\*\*  
ID 00008401 Name

**Feeding Information**

**Ever Breastfed** ☐ Yes ☒ No ☐ Unknown ☒ Requires Food Package III Date Food Package III Verified 4/9/2010  
☐ Breastfeeding Now Date Breastfeeding Verified  
Amount of Breastfeeding Not Applicable Date Breastfeeding Began  
Reason(s) Stopped Advised to Stop by Physician or Other Health Professional Date Breastfeeding Ended  
Alcohol/illicit drugs interfering with breastfeeding Date Supplemental Feeding Began 5/4/2009  
Baby Fussy, Not Satisfied Date Solids Were Introduced  
Breast Problems (plugged ducts, mastitis)

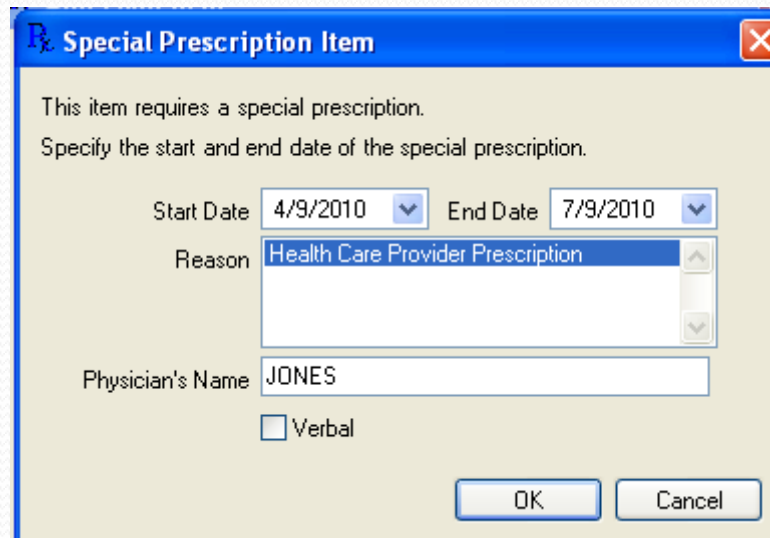
4/9/2010 12:21 PM

# Entering the Food Prescription

- Based on the RD approved formula, supplemental foods, and the length of the approval, enter the food prescription for the participant
- Having “Requires Food Package III” marked brings up an expanded list of formulas to select from
- The approval information may need to be entered multiple times if the approval crosses over food prescription age boundaries (Ex. From 4-5 to 6 months)



# Entering Special Prescription Items



The screenshot shows a Windows-style dialog box titled "Special Prescription Item" with a red close button in the top right corner. The dialog has a light beige background and contains the following elements:

- Instructional text: "This item requires a special prescription." followed by "Specify the start and end date of the special prescription."
- Start Date: A text box containing "4/9/2010" with a small downward arrow on the right.
- End Date: A text box containing "7/9/2010" with a small downward arrow on the right.
- Reason: A label followed by a list box. The list box has "Health Care Provider Prescription" selected and highlighted in blue. There are upward and downward arrows on the right side of the list box.
- Physician's Name: A label followed by a text box containing "JONES".
- Verbal: A checkbox labeled "Verbal" which is currently unchecked.
- Buttons: "OK" and "Cancel" buttons at the bottom right.

# How the Prescription Appears

The screenshot displays a software application window with a menu bar (File, Participant Activities, Benefit Management, Document Imaging, Help) and a toolbar. A tabbed interface shows several tabs: Health Information, Demographics, Nutrition Education, Immunization, Referrals, HT/WT/Blood, Income History (selected), Food Prescription, Benefits History, Risk Factors, Appointments, and VENA. The main content area is titled 'Food Prescriptions' and contains a tree view under 'Food Prescription for Certification'. The tree view shows a date '04/09/2010' with a list of items: '6 - 16 OZ CAN(S) POWDERED ALIMENTUM', 'SPECIAL RX: 04/09/2010 - 07/09/2010', '32 - 4 OZ JAR(S) BEECH-NUT OR GERBER FRUITS AND/OR VEGETABLES', and '1 - 8-OZ BOX(ES) BEECH-NUT OR GERBER INFANT CEREAL'. Below the tree view are 'Add...', 'Edit...', and 'Delete' buttons. The status bar at the bottom right shows the date and time '4/9/2010 12:50 PM'.

File Participant Activities Benefit Management Document Imaging Help

Health Information Nutrition Education Referrals Income History Benefits History Appointments  
Demographics Immunization HT/WT/Blood Food Prescription Risk Factors VENA

Food Prescriptions

Food Prescription for Certification

- 04/09/2010
  - 6 - 16 OZ CAN(S) POWDERED ALIMENTUM
  - SPECIAL RX: 04/09/2010 - 07/09/2010
  - 32 - 4 OZ JAR(S) BEECH-NUT OR GERBER FRUITS AND/OR VEGETABLES
  - 1 - 8-OZ BOX(ES) BEECH-NUT OR GERBER INFANT CEREAL
- 12/02/2009

Add... Edit... Delete

4/9/2010 12:50 PM